

Manager Self-Service Absence Management Training Manual

PeopleSoft 9.2

DISCLAIMER

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MANAGER SELF SERVICE - ABSENCE MANAGEMENT

Overview

All employees who earn leave will request time off through the Absence Management module in PeopleSoft. This applies to all types of leave: sick (with the subset of dependent sick), annual, jury, military and funeral.

An absence can be requested for an event that occurred in the past (e.g. a sick day) or for an event to occur in the future, such as annual leave. All absences should be entered by the employee, and approved by the supervisor, no later than the end of the pay period in which the absence occurs.

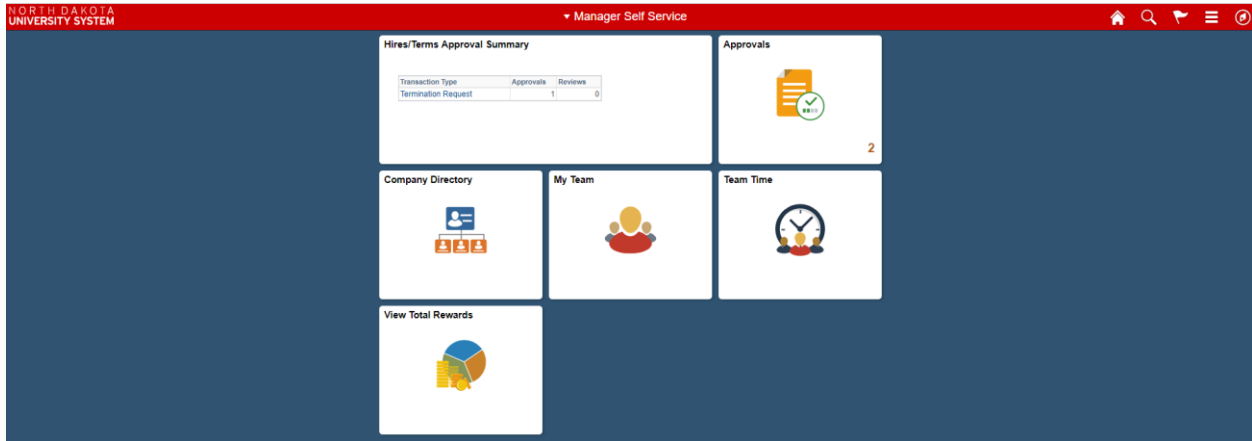
An absence cannot be requested for a date an employee is not scheduled to work. Basic employee schedules have been populated into the module.

Employee balances reflect the pay period of the most recent check. For example, if today is April 23; the last paycheck was April 15th, the pay period for April 15th paycheck is March 16th-31st. The leave balances would be current as of March 31st. Please contact your Human Resources/Payroll Office if you feel your balances are incorrect.

The business process under the new process is as follows:

1. An employee signs into PeopleSoft and enters a leave request before (for planned absences) or after (for unplanned absences) an event.
2. The supervisor signs into HRMS
3. The supervisor has three choices for taking action on the request:
 - a. Approve – the employee receives an approval email
 - b. Deny – the employee receives a denial email
 - c. Push back – the employee receives an email requesting modification of the request.

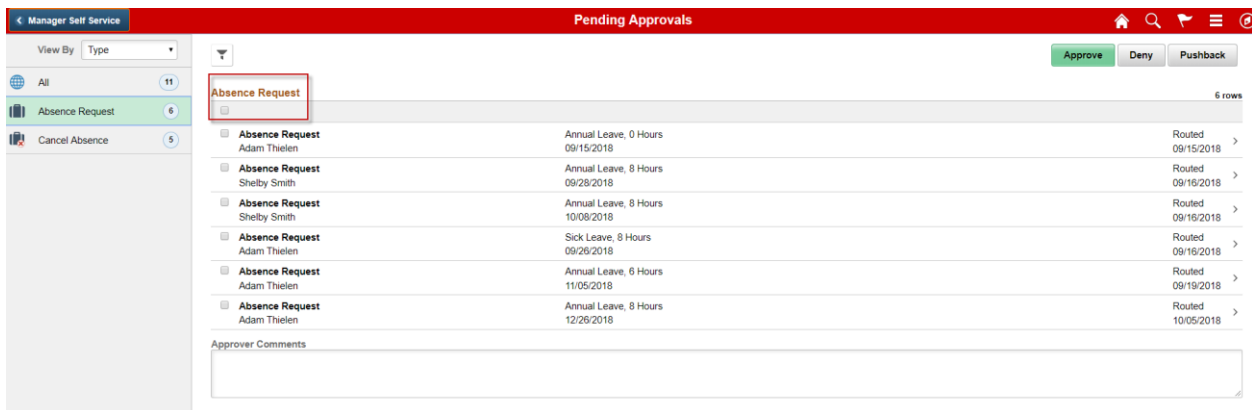
If the request is approved, it is processed in the next pay cycle.



APPROVALS TILE

Approving, Denying and Pushing Back Absence Request

Click on Approval Tile on MSS homepage to Approve submitted absence requests



Click on check box below **Absence Request** to Approve multiple request at one time. If you click on a absence request you will open the Absence Details page and can Approve, Deny or Pushback the request

Adam Thielen
NDUS SITS Professional

Absence Details

Absence Name	Annual Leave	End Date	09/26/2018
Start Date	09/26/2018	Duration	8 Hours
Partial Days	None		
Current Balance	248.95 Hours	Disclaimer	

Additional Information >

▼ **Requester Comments**

There are no requester comments

Request History >

Approver Comments

Approval Chain >

Add any comments if needed, not required.

Request History

- Click Request History link to view the transaction history for this absence request.

Approver Comments

- Enter any comments related to the approval action you take.

Approval Chain

- Click this item to open the Approval Chain page, where you can review information about all approvers for the transaction

Choose either Deny, Approve or Push Back

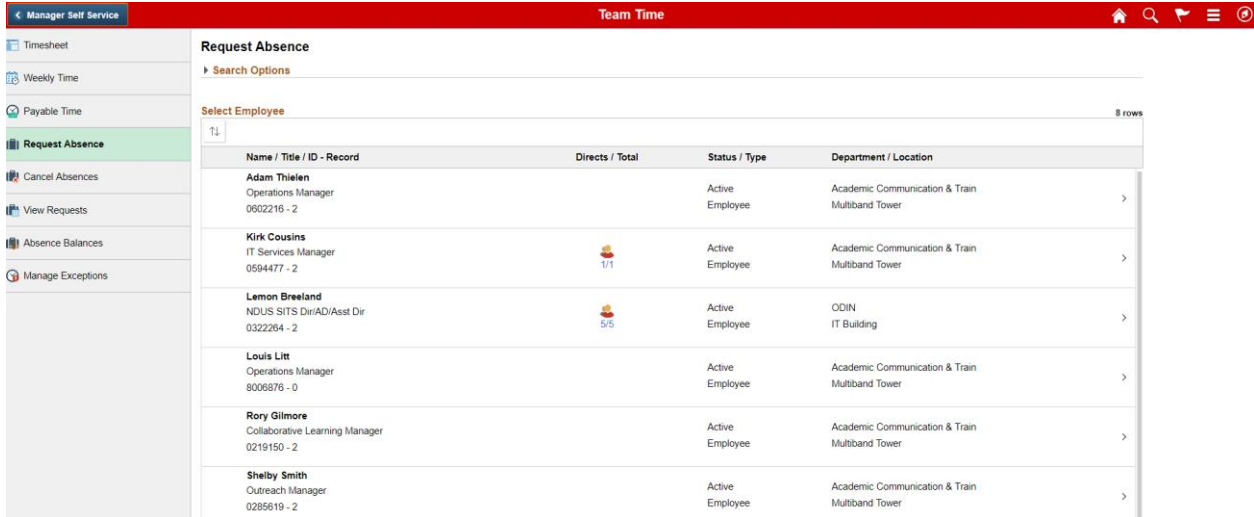
If you click the **Deny** button, the employee will be notified by email, and the absence request will now appear in your denied status.

If you click the **Push Back** button, the employee will be notified via email and it will be removed from your list of pending approvals.

If you click the **Approve** button, the employee will be notified by email, and the absence will now be ready for processing.

TEAM TIME TILE

The Team Time tile allows you to view and submit absence requests for your employees. You can also view balances, manage exceptions and view and approve time reporting using the tasks in the Team Time tile. Select the task, then employee, and the system walks you through the steps.

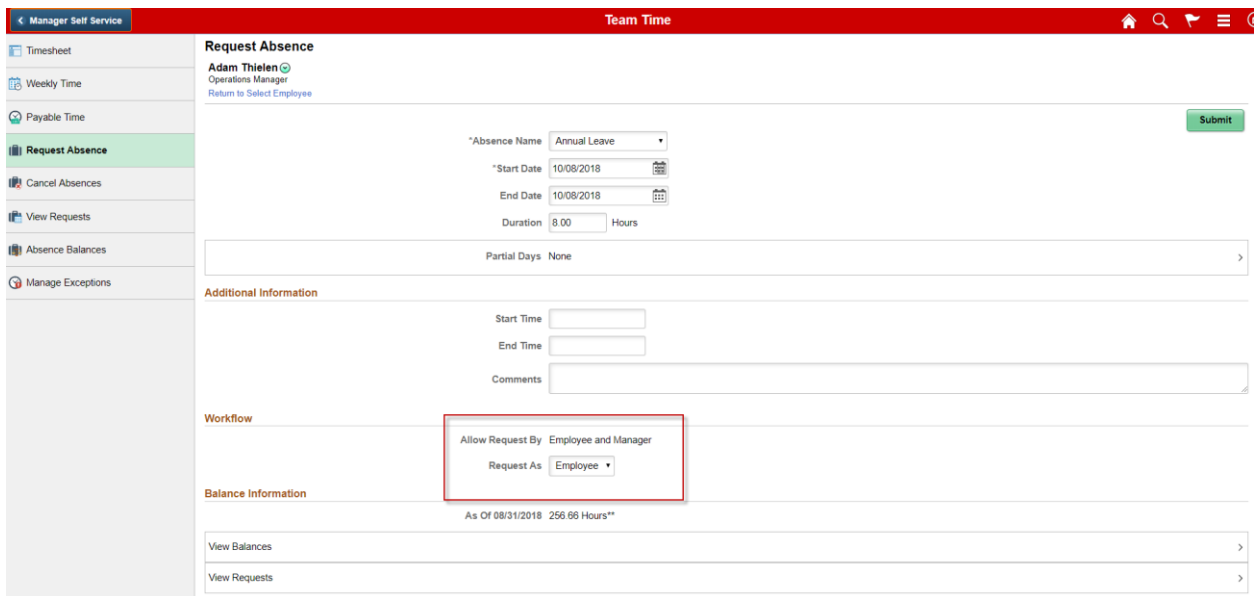


Request absence on behalf of employee

Request Absence

Managers may request and absence on behalf of the employee if they are unable to do so. This is only recommended if the employee is not able to request the leave upon returning from work.

Select the employee for Request Absence



1. Under **Workflow** -- under **Request as** -- select either **Employee** or **Manager**.
 - **Request as: Employee (this is recommended)** - it will automatically be approved by the supervisor.
 - **Request as: Manager** – it will need to be approved by the manager who entered the request because as a manager requesting it they also cannot approve it.
2. Click on **Submit**.

If you choose **Request As: Employee** the request will be submitted and approved.
Employee will receive an email notifying them this absence is submitted and approved on their behalf

Cancel Absences

Cancel Absences

1. Click the employee
2. Click on the absence row you want to cancel
3. In the **Cancel Absence** page, click **Cancel Absence**
4. On the **Confirmation** pop-up, click **Yes**



If the absence was already approved by the manager, the manager **MUST** approve the cancel absence request before the absence is cancelled.

If the absence was never approved by you as the manager (e.g., if it was in a submitted status), your cancellation action automatically cancels the absence when the employee cancels the request.



Absences can be submitted, and approved, easily using mobile devices.

Absences are approved through the **Approvals** tile, covered in this document.

Viewing absence request history

View requests

Click the employee you want to view absence request history for

Viewing an Employee's Absence Balances

Absence Balances

Team Time

<ul style="list-style-type: none">TimesheetWeekly TimePayable TimeRequest AbsenceCancel AbsencesView Requests<li style="background-color: #e91e63; color: white;">Absence BalancesManage Exceptions	<h4>Absence Balances</h4> <p>Adam Thielen Operations Manager Return to Select Employee</p> <table border="1" style="width: 100%; border-collapse: collapse;"><tr><td style="padding: 5px;">Sick Entitlement</td><td style="text-align: right; padding: 5px;">985.37 Hours</td></tr><tr><td style="padding: 5px;">As Of 08/31/2018</td><td></td></tr><tr><td style="padding: 5px;">Annual Entitlement</td><td style="text-align: right; padding: 5px;">256.66 Hours</td></tr><tr><td style="padding: 5px;">As Of 08/31/2018</td><td></td></tr></table> <p><small>**Disclaimer The current balance does not reflect absences that have not been processed.</small></p> <p>Forecast Balance</p>	Sick Entitlement	985.37 Hours	As Of 08/31/2018		Annual Entitlement	256.66 Hours	As Of 08/31/2018	
Sick Entitlement	985.37 Hours								
As Of 08/31/2018									
Annual Entitlement	256.66 Hours								
As Of 08/31/2018									











From here you can also forecast the balance for an employee.

Click Forecast Balance, enter the date you want to forecast for (**As of Date**), and **Absence Name**; once this is entered the **Forecast Balance** button will appear. Click the **Forecast Balance** button.

Forecasted balance will include all leave that has been requested.

MY TEAM TILE

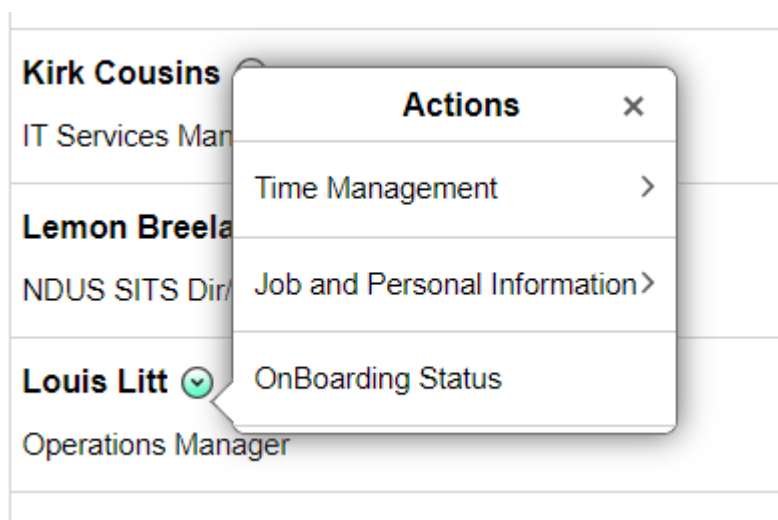
This tile allows you to view summary information for your direct and indirect reports. The information provided in this tile includes job data, contact info, leave balances, and compensation data.

My Team				
Summary Compensation Leave Balances				
Name / Title	Directs / Total	Department / Location	Email / Phone	Today's Status
Adam Thielen  Operations Manager		Academic Communication & Train Multiband Tower	kate.greicar@ndus.edu 701/239-6623	
Kirk Cousins  IT Services Manager	 1/1	Academic Communication & Train Multiband Tower	kate.greicar@ndus.edu 701/237-6114	 Planned Absence
Lemon Breeland  NDUS SITS Dir/AD/Asst Dir	 5/5	ODIN IT Building	kate.greicar@ndus.edu 218/773-4046	
Louis Litt  Operations Manager		Academic Communication & Train Multiband Tower	kate.greicar@ndus.edu	
Rory Gilmore  Collaborative Learning Manager		Academic Communication & Train Multiband Tower	kate.greicar@ndus.edu 701/239-6605	
Shelby Smith  Outreach Manager		Academic Communication & Train Multiband Tower	kate.greicar@ndus.edu 701/492-6244	 Planned Absence

The Today's Status column will display an icon if an employee is off due to a planned absence or holiday. Access indirect reports by clicking the hyperlink in the Directs/Total column. To view Compensation or Leave information, click the tabs at the top of the page.

You can access other employee tasks by clicking the arrow next to the employee's name

OnBoarding Status – this will show if the employee is new and is currently onboarding, you can check status of onboarding steps and send a reminder message to your employee if necessary.



VIEW TOTAL REWARDS

Your team members' Total Rewards statements are found in this tile

VIEW MONTHLY TIME CALENDAR

Navigate to: **Manager Self Service>Time Management>View Time>Monthly Time Calendar**

The Monthly Time Calendar will list all employees that report to you. You can change the month by clicking on previous month, next month or click on the drop down for month and year.

Monthly Time Calendar

Employee Selection Criteria

Description	Value
Time Reporter Group	<input type="text"/>
Empl ID	<input type="text"/>
Empl Record	<input type="text"/>
Last Name	<input type="text"/>
First Name	<input type="text"/>
Business Unit	<input type="text"/>
Job Code	<input type="text"/>
Job Description	<input type="text"/>
Department	<input type="text"/>
Reports To Position Number	00100342
Company	<input type="text"/>
Position Number	<input type="text"/>

Clear Selection Criteria Save Selection Criteria Get Employees

Expand to view Instructions

Daily Calendar Weekly Calendar Monthly Calendar

View Criteria

Month: 11 - November Previous Month Next Month

Year: 2017

Start Time: End Time:

Reported or Payable Hours

Reported Hours Payable Hours

Display Options

Show Schedule Show Holidays Show Symbols

Show Training Hours Show Planned Overtime

Show Absences Show Exceptions

View Month

Step 1: Click on Get Employees. A list of employees will appear in the calendar below.

Step 2: From the Display Options, select items you wish to view in the calendar. (Graphic A)

Graphic A

Monthly Time Calendar																
Employee	Job Title	Total	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue
Joe Mauer	IT Services Manager	16.00	-	-	-	-	-	-	-	-	-	-	-	-	-	-
		176.00	08.00	08.00	08.00	-	-	08.00	08.00	08.00	08.00	08.00	-	-	08.00	08.00
Katey Benson	Collaborative Learning Manager	16.00	-	-	-	-	-	-	-	-	-	-	-	-	-	-
		176.00	08.00	08.00	08.00	-	-	08.00	08.00	08.00	08.00	08.00	-	-	08.00	08.00
Sharon Knight	Outreach Manager	16.00	-	-	-	-	-	-	-	-	-	-	-	-	-	-
		176.00	08.00	08.00	08.00	-	-	08.00	08.00	08.00	08.00	08.00	-	-	08.00	08.00
Shelby Smith	Operations Manager	16.00	-	-	-	-	-	-	-	-	-	-	-	-	-	-
		176.00	08.00	08.00	08.00	-	-	08.00	08.00	08.00	08.00	08.00	-	-	08.00	08.00

Legend			
Approved Absence	Requested Absence	Holidays	Workday
Off Day			

Step 3: Types of absence will then populate in this calendar. Refer to Legend for description of types.

DELEGATE APPROVAL ABSENCE

Managers have the ability to delegate their approval of absence and approval of cancel of an absence to others. The person delegated to is called the proxy. Delegations can be made for a specific time frame or can be open ended.

When the delegation is submitted, the proxy will receive an email notification. The proxy must accept the delegation in order to be able to perform the task. Once accepted, the delegation remains until the end date is reached or until the delegator revokes the delegation.

NOTE: *Once you delegate your approval of absence you will no longer be able to approve the absence.*

To navigate to delegate approval absence click on **Main Menu>Self Service>Manage Delegation**

Manage Delegation

Harvey Specter

Some of your self-service transactions can be delegated so that others may act on your behalf to initiate and/or approve transactions for you and/or your employees. In addition, others may have delegated responsibility for their transactions to you.

[Learn More about Delegation](#)

Select *Create Delegation Request* to choose transactions to delegate and proxies to act on your behalf.

[Create Delegation Request](#)

Select *Review My Proxies* to review the list of transactions that you have delegated and the proxy for each transaction.

[Review My Proxies](#)

Click Here

Create Delegation Request

Enter Dates


Harvey Specter
 NDUS SITS Administration

Enter the dates for your delegation request. Enter a *From Date* that is today or later. Enter a *To Date* that is the same as or later than your *From Date*. For open-ended delegation requests, leave the *To Date* blank.

Delegation Dates

From Date BY

To Date BY



Create Delegation Request

Select Transactions

Harvey Specter
 NDUS SITS Administration

Select the transactions that you want to delegate to a proxy. You can select one or many transactions.

Delegate Transactions

	Transaction
<input type="checkbox"/>	Absence Cancelation
<input type="checkbox"/>	Manage Approve Reported Time
<input type="checkbox"/>	Manager Absence Approve
<input type="checkbox"/>	Termination Approve
<input type="checkbox"/>	Termination Initiate

To Create the Request:

1. **Select Manager Absence Approve**, or other delegate transaction as needed.
2. **Click Next** – the Select Proxy by Hierarchy page will show (see below). This page displays persons within your hierarchy that you can select as proxies. Select the radio button next to the name to select that person as a proxy. You can also select the Search by Name hyperlink to search for proxies outside your hierarchy.

Create Delegation Request

Select Proxy by Hierarchy

Harvey Specter

NDUS SITS Administration

This page displays persons within your hierarchy that you can select as proxies. Select the radio button next to the name to select that person as a proxy. You can also select the [Search by Name](#) hyperlink to search for proxies outside your hierarchy.

[Search by Name](#)

Choose Delegate

	Name	Empl ID	Organizational Relationship	Job Title	Department	Supervisor Name
<input type="radio"/>	A. Louis Litt	8006876	Employee	NDUS SITS Professional	Academic Communication & Train	Harvey Specter
<input type="radio"/>	Adam Thielen	0602216	Employee	NDUS SITS Professional	Academic Communication & Train	Harvey Specter
<input type="radio"/>	Angie Breeland	0082369	Employee	NDUS SITS Dir/AD/Asst Dir	Security	Harvey Specter

- 3. Click, Next and Submit.** The proxy you selected will receive an email and must go to Manage Delegation to accept the delegation.



Once you have delegated to a proxy you no longer will be able to Approve Absence's, your proxy or your Manager will have to approve absences for the employees who report to you.

GETTING TO KNOW FLUID



Home button. Use to return to the default homepage, which is the fluid homepage the user was last using during the current instance on PeopleSoft.



Search button. Use to perform Global Search.



Notifications button. Displays the notification window showing any pending actions or alerts.



Actions List button. Use to display the actions menu based on the page you're viewing. Allows user to add/customize home pages and the navigation bar.

** Indicates that the menu option will differ depending on the page the user is currently viewing.*

*Personalize Homepage (when viewing a Homepage): Allows the user to add, remove or move tiles within their Homepage(s).

*Add to Homepage (when viewing a regular page): Adds a tile to the desired homepage, enabling the user to access the fluid page directly from the homepage.

*Add to NavBar (when viewing a regular page): Adds a shortcut to the left-hand side of the NavBar, enabling access to that fluid page directly from the NavBar.

*Add to Favorites (when viewing a regular page): Adds a link to the My Favorites node of the NavBar.

My Preferences: Modify settings that control a variety of options in the interface based on your preferences.

Help: Takes the user to the website that contains the UPK videos.

Sign Out: Signs the user out of their instance of PeopleSoft.



Navigation bar button (compass). Use to display the navigation bar ("NavBar"). Access additional navigational options.

The Actions List icon gives options for personalization, viewing preferences, accessing help, or signing out of PeopleSoft.

If accessing the Actions List from a page other than a homepage, there will also be additional menu items including: Add to Homepage, Add to NavBar, and Add to Favorites.

1. From the Self-Service Homepage, click the Actions List icon.
2. Select an item from the menu:
 - a. Personalize Homepage – add/edit homepages or add/edit tiles on a homepage (see Personalizing Homepages for details)
 - b. My Preferences – edit general settings
 - c. Help
 - d. Sign Out –logs user out of PeopleSoft

From a page in PeopleSoft (not the homepage), click the Actions List icon.

2. Select an item from the menu:
 - a. Add to Homepage – add the current location to one of your homepages
 - b. Add to NavBar – add the current page to the NavBar
 - c. Add to Favorites – add the current page to Favorites can be accessed from the NavBar